

CA-PMM Frequently Asked Questions

#	Question	Answer
	GENERAL	
1	What is the definition of an IT Project?	<p>For the purposes of determining when the use of the CA-PMM is required, the following criteria are applied. The proposed IT project:</p> <ul style="list-style-type: none"> - Consumes at least 500 hours of effort. - Provides and IT solution to a business problem or opportunity. - Has a start date and a target finish date. - Has defined objectives. - Has named deliverables. - Has defined budget and resources. <p>Projects that do not meet the above criteria may be managed using tools and project management methodology as determined by the department. However, at minimum each project should have a Project Charter, a schedule, and a method to track cost, scope, and quality.</p>
2	Do vendors have to follow the CA-PMM Toolkit?	All IT projects as defined above must be managed using the CA-PMM, including the Toolkit, regardless of who is managing the project.
3	How was the CA-PMM developed?	The OCIO in collaboration with the Center for Project Management and several state agencies developed the CA-PMM using the Project Management Institute's Project Management Body of Knowledge (PMBOK) and state best practices. The CA-PMM fulfills the need for statewide standardization and continuity in IT project management and reporting.
4	Are state agencies required to use the CA-PMM Toolkit even though they may have other tools?	Yes, all state agencies are required, at minimum, to use the CA-PMM. However, this does not prevent the use of additional tools or expanding the Toolkit. When submitting any requested PM documents/artifacts to the OCIO, we will require them to be in the CA-PMM Toolkit format. This will enable the OCIO to collect statewide data in a standard format for better management and reporting of the state's IT project portfolio.
5	Do non-IT staff who have a Project Management Professional certification meet the state's IT Project Manager qualifications?	The IT Project Manager qualifications include experience, at varying levels, on IT projects. Certification or experience managing other types of projects does not by itself qualify a person to manage IT projects. Please refer to the Complexity Assessment in the CA-PMM Reference Manual and Toolkit for additional information regarding IT Project Manager qualifications guidelines.

CA-PMM Frequently Asked Questions

#	Question	Answer
6	Is the CA- PMM required for Maintenance and Operations (M&O) activities?	For the purposes of determining when to apply the CA-PMM to IT efforts to be considered an IT Project, the effort must meet the conditions noted above in item 1. Generally, M&O is not considered an IT project and will not require use of the CA-PMM.
7	Will the CA-PMM Toolkit replace the use of the Feasibility Study Report or other project reporting documents?	The OCIO plans to review the existing project documents (FSR, SPR, ITPP, etc.) and processes to identify how and where the CA-PMM can be leveraged to minimize duplication of information. This effort may result in the replacement of project documents with the CA-PMM Toolkit with appropriate modifications.
8	Can the information in the Toolkit be made 'repeatable' (e.g., boilerplate) to be able to cut and paste for other projects?	The Toolkit allows for copy and paste; however, it is not recommended except where there are specific policies or standards in place (e.g., project library standards). The Toolkit is designed to help the Project Manager ensure that the appropriate questions are asked and considered. Each project should be evaluated and analyzed on its own unique characteristics.
9	Is there a plan for in-depth training for AIOs and CIOs?	The California Qualified (CalQ) program includes an Executive Briefing and Sponsorship Seminar. Please refer to SIMM Section 17E for the training courses.
10	How will the OCIO assist state agencies in managing changes brought about during the CA-PMM implementation?	The OCIO will establish a CA-PMM User Group to provide ongoing information and receive feedback from agencies. In addition, the OCIO will establish a Help Desk for assistance in using the Toolkit. Prior to the establishment of the User Group and Help Desk, please refer your questions/needs to your OCIO representative.
11	How will the OCIO ensure that the CA-PMM is used successfully by state agencies and is working well for managing IT projects?	The OCIO will continue to work with agencies and solicit feedback through User Groups for continuous improvement and feedback from state agencies.
12	How can I size the Toolkit for very small projects?	The Toolkit is designed to be scalable by the use of "N/A" in fields that do not apply to your project. It is recommended that each item be considered. Since projects each have unique characteristics, the OCIO chose not to delete any components of the toolkit for very small projects.

CA-PMM Frequently Asked Questions

#	Question	Answer
13	If there is no Project Manager on the project until after the FSR is approved, who is responsible to work the Toolkit?	There should be a Project Manager assigned after the Concept Statement is approved. The Project Manager during the Charter and FSR development efforts does not necessarily have to be the same Project Manager assigned after FSR approval.
14	One of the criteria for requiring the use of the CA-PMM is the definition of an IT project in that it consumes at least 500 hours of effort. Does this definition affect the criteria for using the FSR or Project Summary Package for reporting?	The CA-PMM policy does not affect the FSR or PSP reporting criteria; it remains the same.
15	Does the 500 hours of effort include contractor hours?	Yes.
PROJECT CONCEPT		
1	What is the definition of a “concept” and how is it used in context of Project Portfolio Management?	A concept as used in the CA-PMM is defined as an idea for the solution of a business problem or opportunity. At an enterprise level, the many concepts that are developed are evaluated with the Project Portfolio and IT Strategic Plan to determine the fit, priority, and opportunities for leverage and collaboration.
2	For the Concept Statement, what level of analysis is required? Some of the information looks like it could be in a feasibility study.	The purpose of the Concept Statement is to communicate high-level information about a project idea. Ideas for a proposed project go through due diligence to identify, at a high level, its potential value, alignment with organizational strategy, and any overlap with other existing or proposed projects. The analysis should capture, at a minimum, the intent of the project providing all stakeholders sufficient information to determine if the project merits further study.
3	Should oversight be included in the Size Estimate? Is oversight considered part of the cost/effort of a project phase?	Any anticipated cost/effort for oversight associated with an IT project should be included in the Size Estimate.
4	Will this estimating methodology be the standard? Will the OCIO require that all departments use this estimating methodology?	The estimating methodology included in the CA-PMM is not required on all projects. It will only work with projects for which there is known technology and ability to use history for developing estimates. Other estimating tools and methodologies can be applied where needed.
PROJECT SCOPE		
1	Should development of the Project Management Plan be included within the project’s scope?	No. The project scope refers to the requirements and deliverables needed for the product, not for project management.

CA-PMM Frequently Asked Questions

#	Question	Answer
	PROJECT CHARTER	
	COMPLEXITY ASSESSMENT	
1	Why is the Complexity Assessment conducted in the Project Charter? Should not this activity be done during the Concept Stage?	The Complexity Assessment is not included in the Concept Stage because it is unlikely there is sufficient information known that early in the PM Life Cycle. However, the Complexity Assessment is also a separate item in SIMM Section 17 (along with selected other excerpts) because we recognize that this tool can and will be used and revised throughout the PM Life Cycle. If there is enough information known at the Concept Stage, please do consider using this tool during the concept stage.
	PROJECT MANAGEMENT PLAN	
	REPORTING	
1	How will project status be reported to the OCIO?	The "Project Manager to Project Sponsor" and the "Project Sponsor to Steering Committee" status reports along with the "Monitoring Vital Signs Scorecard" will be submitted electronically through e-mail to the department's OCIO representative. The Status Report template is excerpted and separately accessible from the Toolkit in SIMM Section 17. Please note that the status reports will be displayed on the OCIO's "Approved State IT Projects" web site.
2	Do we submit the entire Toolkit or portions of the Toolkit to the OCIO? What is mandatory or required?	It is not necessary to submit the entire Toolkit to the OCIO unless upon specific request. The mandatory submissions are: (1) The Concept Statement with the IT Capital Plan; and (2) The Project Manager to Sponsor Report and the Sponsor to Steering Committee Report which includes the "Monitoring Vital Signs Scorecard." Please see the Information Technology Policy Letter 09-01.
	SCOPE MANAGEMENT PLAN	
1	The Scope Management Plan includes a section to describe the process planned for developing the detailed scope statement. However, I do not see a section within the Scope Management Plan (or anywhere else) to actually enter the detailed scope statement.	The detailed scope statement is developed separately from the Scope Management Plan. The detailed scope statement is a product of the System Development Life Cycle.

CA-PMM Frequently Asked Questions

#	Question	Answer
	CONFIGURATION AND CHANGE CONTROL MANAGEMENT PLAN	
1	The Toolkit asks for the "tools" to be used for managing project configuration control and the "processes" to be used for managing project configuration control. What is the difference between "tools" and "processes?"	Tools are pencils and paper, databases, spreadsheets, other software. Processes address the inputs, what you do with them, and the outputs.
2	How does the Change Request relate to the Special Project Report (SPR)?.	The Change Request is an internal document for project management purposes. There is no change to the SPR reporting criteria with the CA-PMM implementation.
	COST MANAGEMENT PLAN	
1	The Toolkit asks for the process for re-baselining the project costs. We presume the budget baseline is only changed with an SPR. Should cost changes be included as part of the Change Control Process? Do you want specific data included in the annual cost summary?	<p>The SPR is the process for OCIO approval of the rebaselined costs if the change meets the criteria for reporting. The intent of the question is to help Project Managers examine internal communication, documentation, and approval processes (e.g., Steering Committee role). Cost changes are also part of the Change Control process.</p> <p>The OCIO expects costs in the Cost Management Plan to map to costs in the Economic Analysis Worksheets (EAWs), and to be updated regularly to show budgeted/approved and actual costs as the project is executed.</p>
2	The Toolkit asks for the location of the cost repository and the location of the spreadsheet or database used to track current budget and expenditures. Shouldn't the spreadsheet be filed in the cost repository? What is the purpose of asking two different questions that seem to have the same answer?	The cost repository refers to the spreadsheet or database you will use. The location of that repository refers to a file, folder, office, etc.
	SCHEDULE MANAGEMENT PLAN	
1	What is the definition for "baseline schedule?" The Schedule Management Plan asks for the process for establishing the baseline schedule.	The baseline schedule is the initial project schedule accepted by the Project Sponsor and approved by the Department Director and the OCIO (if required). The baseline schedule is used to measure progress and compare schedule estimates to actual performance.

CA-PMM Frequently Asked Questions

#	Question	Answer
2	The Toolkit asks for the procedures to be followed to propose and approve changes to the schedule baseline. Should the only vehicle for changing a schedule be the SPR? Should any changes in schedule go through the change control process?	Schedule changes happen frequently in projects and an SPR is not required unless the schedule is 10% over the last approved schedule and the project is reportable to the OCIO. The Toolkit is used for the department's internal planning and procedures (e.g., decisions, reviews, approvals). Schedule changes also go through the change control process.
3	What is the definition of "baseline cost?"	The baseline cost is the initial project budget accepted by the Project Sponsor and approved by the Department Director and the OCIO (if required). The baseline cost is used to measure progress and compare cost estimates to actual costs.
4	Does the Toolkit need to be modified for using Agile or other repetitive/iterative development cycles?	It should not be necessary to modify the Toolkit under those circumstances. The schedule estimate tool includes up to 90 percent allowance for phase overlap, and as much lag time as needed to adjust the schedule.
RISK MANAGEMENT PLAN		
1	What is the definition of issue and risk?	An issue is defined as an unanswered question or difference of opinion. A risk is an uncertain condition or event that, should it occur, will impact the project negatively. Please see the CA-PMM Reference Manual for more information.
2	How is the Risk Rating calculated?	<p>On the Risk Register (Planning, Project Management Plan, Risk Management Plan) the formula is: Probability x Impact x Risk Action Must Begin.</p> <p>The scale for probability and impact is 1 – 5, the scale for Risk Action Must Begin is within the next six months =1, six months to a year = .66, over a year from now = .33.</p> <p>Example: Probability (5) x Impact (3) x Risk Action Must Begin (.66) = 9.9 Green.</p>
3	Are departments expected to submit the Issue Log and Risk Register to the OCIO?	Only upon request by the OCIO; otherwise, the Issue Log and Risk Register are for internal project management purposes only.

CA-PMM Frequently Asked Questions

#	Question	Answer
	PROCUREMENT MANAGEMENT PLAN	
1	Do departments have to complete both the Procurement Management Plan in the Toolkit and the IT Procurement Plan for the Department of General Services?	Yes, at this time. In the future the OCIO plans to work with DGS to see how these can be combined.
	CLOSING STAGE	
1	How does the CA-PMM affect the PIER requirements?	There are no changes to the PIER requirements at this time. Departments may use and submit the PIER template in the Toolkit if they so choose, but it is not required. The OCIO will accept the PIER in either the Toolkit or other form.
	TRAINING	
1	Who (OCIO or department) will make the decision on what classes can be substituted for CalQ certification?	The CIOs and AIOs should review the course descriptions for courses identified as CalQ in the DTS' Training Center course lists beginning summer of 2009. DTS will identify those that are CalQ classes. If an individual has taken training that is substantially the same as the course descriptions, the CIO/AIO can count it.
2	Who (OCIO or department) will actually certify the project managers? Will there be an actual certificate issued?	There will not be a certification issued for CalQ. The CIO/AIO will confirm that an individual has completed the California Qualified program.
3	Is MS Project 2007 still required if a department does not use the newest version?	Due to the current economic condition, departments may delay use of MS Project 2007 and continue to use MS Project 2003. However, 2007 is the standard because it calculates Earned Value. As we move into requiring the use of Earned Value on IT projects (training to be determined), 2003 users will need to have a separate methodology for calculating Earned Value.
4	Can staff still be a PM while waiting to take the training classes?	If the person otherwise has the appropriate experience and training to be a PM, they can start the project, but should plan to attend training as soon as possible (and should plan for that training in the project schedule).
5	Can the cost of the training class be included in the project cost for a PM assigned on a project?	Yes. Costs associated with the project should be included.
6	Who is required to attend CA-PMM training?	There are different courses required for IT project participants depending on their roles. Please refer to SIMM Section 17E for CA-PMM training information.

CA-PMM Frequently Asked Questions

#	Question	Answer
7	Is there any preparation I need for the training other than the prerequisites?	Have an IT project in mind that you might want to work with as sample to use during the training class. Please do not bring an FSR or other project documentation, however.
8	Is the OCIO going to require certification for Project Managers?	No, the OCIO is not requiring certification for Project managers. The California Qualified (CalQ) program requires completion of a certain set of training courses. The department CIO and/or AIO must confirm that the training and experience have been met.